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SECOND WORLD COFFEE PRODUCTION ESTIMATE FOR 1981/82 UP SLIGHTLY

The second USDA world coffee crop estimate for 1981/82 is for a total production of 95.6 million 60 kilogram bags, of which an estimated 75.0 million bags would be available for export. Based on past performance the chances are two out of three that this second estimate will not vary more than 2.9 percent from the final outturn for the year. The increase of 1.4 million bags over the first USDA estimate for 1981/82 is due mainly to upward revisions in production estimates for Costa Rica, Mexico, Brazil, Burundi, Cameroon and Tanzania which more than offset downward adjustments for Dominican Republic, Guatemala, and India.

World coffee production for 1981/82 also is up because estimates for Zimbabwe and Thailand, newly admitted members to the International Coffee Organization (ICO), are included for the first time.

While USDA does not normally release production estimates for the new year until July, an exception is sometimes made for Brazil because of its importance as the world's major producer. Due to the extensive damage believed to have been caused by frosts during late July, a special survey was conducted which revealed the country's coffee production potential for 1982/83 to be reduced to 15 to 18 million bags from 27 to 30.5 million bags.

Brazil and other coffee producers are expected to have carryover stocks totaling about 45.4 million bags at the beginning of 1982/83, up nearly 13.6 million bags from a year earlier. Thus, while world coffee production estimates for 1982/83 may be reduced 10 to 13 million bags because of the Brazilian frost, any deficit between world supply and demand for the year could easily be made up through a drawdown on producer held stocks.

Total world coffee production for 1980/81 is now estimated at 83.7 million bags, with exportable production (production less domestic consumption) estimated at 63.3 million bags, 2 percent above that of 1979/80 due to the larger harvests realized in many producing countries.

Coffee producing and consuming members of the International Coffee Organization met in London, September 7-25. The most important aspects of the package of measures agreed upon to support world coffee prices for the 1981/82 coffee year, beginning October 1, 1981 are included in this report. In addition, the ICO decided to extend the Agreement in its present form until September 30, 1983.

Survey results from the ICO sponsored Winter Coffee Drinking Study of the United States in 1981 showed that consumption declined by 5 percent between 1980 and 1981. The percentage of people drinking coffee showed little change between years but per capita consumption was down.

Production

North America

Forecasts for the approaching coffee harvests in Mexico, Central America and the Carribbean area place the 1981/82 crops at 15.0 million bags, about 1 percent above the 1980/81 harvest. Exportable production for 1981/82 is estimated at 11.4 million bags, up slightly from the preceding year. A record 1.5-million-bag harvest is anticipated in Honduras, while El Salvadorean output will fall to a six-year low at 2.2 million bags.

Costa Rica's 1981/82 (October/September) coffee crop is now expected to total 1.875 million bags, about 8 percent below the current estimate for 1980/81. The expected downturn in the production cycle, accentuated by the low coffee prices and the devaluation of the colon, have adversely affected good management practices, especially the application of fertilizers.

Export contracts through June 15 of the 1980/81 crop year are reported at about 1.23 million bags valued at $178.3 million, down 8.9 percent in volume and 24 percent in value from the preceding year. Coffee export registrations for the 1980/81 crop year ended August 30, 1981. Coffee prices for the October 1-June 15 period averaged $1.10 per pound for sales under export contracts, compared with 53.9 cents per pound for domestic sales. As of June 15, some 135,079 bags of green coffee had been sold at auction for domestic consumption.

Government officials in El Salvador have indicated they will soon launch a major campaign to eradicate coffee rust which treatens to destroy a portion of that country's 1981 coffee crop.

In Guatemala uncertainty now exists as to the total area harvested and coffee produced during 1980/81 (October/September). At least 150,000 bags of green coffee equivalent have not entered the normal trade channels as expected. The losses could be due to the disruption of agricultural production activities by political faction groups. A number of owners appear to have abandoned their coffee plantations, while other plantations may have only been partially harvested. In view of the uncertainty, USDA has tentatively reduced its estimate of the 1980/81 crop from 2.6 million bags to 2.45 million bags. Lower prices also may have been a factor in the lower deliveries. As of July 30, producers were receiving only the equivalent of $71.12 per 100 pounds of parchment coffee and $91.37 for 100 pounds of green coffee.

Heavy and timely rains have helped in the development of a heavy berry load for the up-coming crop year, raising output to 2.6 million bags.

On June 4, 1981, the Roya (coffee rust) Commission reduced its estimate of the area infested by that disease from 817 to 265 hectares. The new numbers apparently did not mean the disease had been irradicated, but only that its location in the eight infected areas had been pinpointed and the quarantined area reduced.

Guatemala's coffee exports totaled 1,359,367 bags through the first three quarters of coffee year 1980/81, including 42,930 bags shipped to non-member markets. Exports for the year could total an additional 500,000 to 550,000 bags during the July/September quarter. Prices for green coffee sold to member countries for the first three quarters of coffee year 1980/81, have averaged $1.16, $1.23 and $1.22, respectively, somewhat above the $1.09, $1.03 and $1.04 per pound prices received from sales to non-members.

In the latter part of June, the government announced concessionary bank loans at 8 percent interest to coffee growers. The loans were to be directed primarily towards small producers. The Coffee Growers Association (ANACAFE) subsequently stated that the reduced interest rate would not be enough to save the industry, i.e. the solvency of the coffee growers. Growers demanded equivalent financial benefits extended to other crops, exoneration from import taxes on pesticides and fertilizers, and financing for buffer stocks being held off from the market because of ICO export quotas. The government then proposed export taxes be eliminated on coffee sold for less than the equivalent of 88.7 cents per pound (about 50 percent at that time). ANACAFE proposed the complete repeal of coffee export taxes in favor of increased income taxes. The matter had not been resolved as of July 30 when export taxes amounted to about 26.52 US cents per pound.

Green coffee production in Haiti is expected to reach 550,000 bags during 1981/82, based on indications of a good flowering and an adaquate moisture supply. This would place the crop at 90,000 bags above the 1980/81 crop reduced by Hurricane Allen. Improper fertilization and tree care also adversely affected output during the past year. This was due in part to the lower producer prices which averaged about 48 to 52 U.S. cents per pound during 1980/81.

Domestic coffee consumption in Haiti was believed to be in the 215,000-bag range during 1980/81. Consumption is growing slowly so that the estimate for 1981/82 is 220,000 bags.

A 550,000-bag harvest during 1981/82 would permit the export of 325,000 bags, however, the actual level will depend largely on the size of the ICO quota allocation for the year. France, Italy, Belgium, the United States and Holland were the principal recipients of coffee in bean form during 1980/81. Small quantities of roasted and/or ground coffees also are exported each year, mainly in unvacuumed packs to several U.S. east coast markets. Coffee exports are Haiti's primary source of foreign exchange.

The estimate for Mexico's 1981/82 (October/September) coffee crop has been raised 100,000 bags from USDA first estimate to 3.85 million bags. Weather conditions have been good in all major growing areas. Coffee rust has been confirmed in the Chiapas region, however, the infestation is very limited and no decrease in output for this reason is expected during 1981/82. On the contrary, increased technical assistance provided by the government to control the disease may prove beneficial in improving coffee plantation management in the area. A 50,000-bag increase in the 1980/81 crop to 3.65 million bags was due to a larger than anticipated harvest in the Tapachula area of Chiapas.

The area planted to coffee in Mexico has remained relatively unchanged for several years, however, the number of trees planted per hectare is gradually being increased in line with rural development/rehabilitation program recommendations. Some plantation owners are increasing their tree density as a future offset to losses anticipated from the presence of rust. Tree population, which ranges from 1,100 to 2,000 per hectare, averages about 1,400 per hectare.

Exports for 1980/81 as of early August were forecast at about 1.985 million bags, including the sale of 1.885 million bags to ICO member markets and 100,000 bags to non-member markets. Sales by the Mexican Coffee Institute (INMECAFE) accounted for about 44 percent of the year's total. The balance was handled by private traders.

For a 20-day period in June and July, INMECAFE suspended exports due to low prices and reports of the frost damage in Brazil. Exports were resumed as prices rose following confirmation that losses were potentially severe.

Shipments during 1980/81 included only the green equivalent of about 50,000 bags each of roasted/ground and soluble coffee, much less than Mexico had hoped for. According to trade sources, exports after October 1 of roasted/-ground coffee will be permitted only if the coffee is packed and privately labeled in Mexico. Soluble coffee exports are handled by INMECAFE which hopes to increase such sales in the future.

South America

Coffee production in South America for 1981/82 is now estimated at 51.2 million bags, up 500,000 bags from the first estimate and 30 percent larger than total production in 1980/81. Exportable production is now placed at 39.8 million bags, about 11.7 million bags above the comparable figure for 1980/81. The production estimate for Brazil has been raised from 32 to 32.5 million bags, based on better than expected dehusking yields in the states of Parana and Minas Gerais. There are no changes in the estimates for the other countries in South America.

Brazil

The major occurrence affecting the coffee world during the 1980/81 coffee year was the slow moving widespread cold front which passed through much of Brazil's coffee growing areas July 20-21, causing losses which were compared with those incurred from the severe frosts of 1902, 1918 and 1975. Frost damage to coffee trees occurs when the temperature falls several degree below freezing, (-3 to -4^{o} Centigrade). The duration and severity of the below-freezing temperature determines the seriousness of the frost damage.

During the early mornings of July 20--21, 1981, the temperatures in the frost-affected areas fell to between-2 and -5.5^{o} Centigrade, according to Brazilian sources.

In order to acertain the extent of potential losses, personnel of the office of the U.S. agricultural counselor in Brazil surveyed field damage in the principal producing states of Parana, Sao Paulo and Minas Gerais. Based on the results of the survey, 40 to 45 percent of the 1982/83 crop was believed lost. The impact on the 1981/82 crop was minor, except in Minas Gerais, where 70 percent of the crop remained unharvested at the time of the frosts. Harvests were already complete in Parana and Sao Paulo. In Minas Gerais, quality, rather than the size of the harvest, was affected. Some of Brazil's better coffees are produced in Minas Gerais.

Due to the frost, Brazil's coffee production potential for 1982/83 was reduced to 15 to 18 million bags from 27 to 30.5 million bags. (The pre-frost production potential for 1982/83 was expected to be 1.5 to 5.0 million bags below the excellent harvest achieved in 1981/82 because of the biennial nature of the coffee production cycle.) Losses were greatest in the southern-most state of Parana, where 70 to 75 percent of that state's 700 million coffee trees were struck by the frost, reducing its output potential for 1982/83 to about 3 million bags from 8 to 9 million bags. In addition to the frost, Parana has suffered from recent drought conditions which could furthur reduce the state's production potential for the year to 1.5 to 2.5 million bags.

The next most seriously hit state was Sao Paulo, where the July frosts damaged as many as 50 to 60 percent of that state's 900 million trees, cutting output for 1982/83 probably by one-half, or to 4 to 5 million bags from 8 to 9 million bags .

About one-third of the estimated 1 billion coffee trees in Minas Gerais, Brazil's largest coffee growing state, were damaged by the late July frosts, reducing next year's coffee crop potential from an estimated 6.5 to 7.5 million bags to an estimated 4.5 to 5.0 million bags. (Owing to the biennial cycle of coffee yields, the prefrost production potential had already been reduced by one-quarter from the record harvest in 1981/82 of 10 to 10.5 million bags.)

Frost damage was localized in southwestern Minas Gerais, where three-fourths of the state's coffee trees are located. No damage was evident in southeastern Minas Gerais, where the remaining one-fourth of the state's coffee tree population is located.

Spotty frost damage also occurred in Mato Grosso du Sul and Goias, which could have reduced the production potential for these states by 100,000 to 150,000 bags.

The following tables indicate the level of tree damage by states and how the pre-and post-frost production potentials compare with the 1981/82 harvest estimates.

State	Pre Frost Population	Killed 1/	Severely Damaged 2/	Moderately Damaged 3/	Lightly Damaged 4/
	(Millions of Coffee Trees)				
Parana.......	700	35	140	158	175
Sao Paulo....	900	45	90	180	180
Minas Gerais.	1,000	--	--	75	263
Total......	2,600	80	230	413	618
Percent......	100.0	3.1	8.8	15.9	23.8

1/ Need to be uprooted.
2/ No production expected for four years.
3/ Requires three years for full recovery.
4/ Requires two years for full recovery.

	Harvest Estimate 1981/82	Pre-Frost Production Potential 1982/83	Frost Reduced Production Potential 1982/83
	(Millions of Bags)		
Parana	7.5-8.0	8.0-9.0	1.5-2.5
Sao Paulo	9.5-10.0	8.0-9.0	4.0-5.0
Minas Gerais	10.0-10.5	6.5-7.5	4.5-5.0
Others 1/	4.0-4.5	4.5-5.0	5.0-5.5
Total	31.0-33.0	27.0-30.5	15.0-18.0

1/ Mato Grosso du Sul, Espirito Santo, Rio de Janeiro, Bahia, Ceara, Pernambuco, Goias.

The 1982/83 Brazilian coffee crop has entered the critical flowering stage of development (September-December). Growing conditions during this period could further influence flowering and fruit set, thereby somewhat modifing the production potential. To accurately guage the crop's development and level of cultural practices, the office of the agricultural counselor in Brazilia plans to conduct extensive field surveys in January 1982, after flowering and fruit set, and again in April 1982 before harvest.

After the devastating frost of 1975, Brazil launched a major coffee tree replanting program which focused on a northward shift out of the frost-prone state of Parana into the relatively frost-free state of Minas Gerais. Measures taken to recover from the 1981 frost will be on a smaller scale and no concerted effort will be made to furthur shift production toward the north. However, some coffee producers in Parana and Sao Paulo, which had barely recovered from the 1975 frost, may now decide to replace the coffee trees, which were killed or badly damaged, with alternative less frost-prone crops.

Based on the suggestions of a working group made up of the Brazilian Coffee Institute (IBC), Central Bank, Banco do Brazil officials and representatives of the producers, the Ministry of Industry and Commerce has submitted to the National Monetary Council for approval of a "Plan for the Recuperation of Frost-damaged Coffee Plantations-1981/82". The plan envisages an overall investment equivalent to about US $700 million. Three special lines of credit have been opened for frost-damaged plantations, on terms compatable with the losses observed in the fields. The financing is designed to cover pruning, replanting and normal care given coffee trees.

To ensure amortization of previous loans in line with the new ability to pay, the time limits for payments due from 1982 forward will be extended 2 to 4 years. In cases where continued coffee production is advisable, the debts may be paid over a period of 3 years. Intercropping with corn, beans, wheat, soybeans, rice, peanuts, sunflowers and other crops will be encouraged in areas where the trees suffered frost damage in order to create an alternative source of income and employment in coffee growing regions.

Colombian production estimates remain unchanged for 1980/81 and 1981/82 at 14.0 and 14.5 million bags, respectively. The Coffee Growers Federation (CGF) estimates that expansion of the coffee area has been negligible over the past 1 and one-half years as institutional credit has been channeled into renovation.

In many countries, lower world coffee prices have curtailed the use of fertilizers for coffee. This is apparently not true in Colombia, where fertilizer use rose from 146,346 tons in 1979 to 188,279 tons in 1980. Colombians with high yielding varieties will continue the intensive use of fertilizers if prices remain above compensatory levels.

Because of ICO quota limitations and the relatively higher prices sought by Colombian exporters, Colombia's exports for the first nine months of coffee year 1980/81 (October--June 1980/81) officially amounted to only 6.7 million bags, 25 percent below exports for the same period of the preceding year. Europe took 64.3 percent of the nine month 1980/81 total and the United States 25.3 percent (down from 33 percent for 1979/80). Private sector exports in 1980/81 accounted for over 30 percent of the total, compared with about 1 percent in 1979/80. Soluble and freeze-dry coffee exports during October-May 1980/81 amounted to the green bean equivalent (GBE) of nearly 93,000 bags, slightly more than the total for coffee year 1979/80.

Foreign exchange earnings from coffee were much lower in 1980/81 than they were in 1979/80. A comparison of Colombia's earnings for the first nine months for the last four marketing years, in US dollar equivalents, is as follows.

Marketing year	Millions of US dollars
1977/78	1,233
1978/79	1,566
1979/80	1,874
1980/81	1,121

Source: Coffee Exporters Association
Coffee Growers Federation

Domestic coffee consumption in Colombia is expected to be up slightly in 1981/82 from 1980/81, when it was estimated at 1.8 million bags. Between 1968 and 1980, the number of plants roasting coffee for domestic use and export declined from 165 to 156, while installed capacity for processing rose from 105,094 bags (based on 22, 8-hour working days per month) to 220,119 bags. Average monthly sales nearly doubled during the period, rising from the GBE of 72,961 bags in 1968, to 140,779 bags in 1980.

As of mid-August, the government had not modified its coffee policy as a result of the Brazilian frost, preferring instead to wait for a clarification of the world coffee situation. Grower prices remained unchanged at 9,200 pesos per "carga" of 125 kilograms, equivalent to US $167.36. The repatriation requirement--the minimum amount of dollars to be deposited at the Banco de la Republica--also stayed unchanged at US $186.50 per 70-kilogram bag of green coffee exported, as did the retention tax, paid in kind, at 20 percent or 18 kilograms of parchment for each 70 kilograms of green coffee exported.

In order to finance the purchase of the harvest during October/December 1981, the government will sell bonds called "Coffee Certificates" in the local stock market. These bonds will mature in 90 to 120 days. Through the bond approach, the government hopes to hold down the money supply, which if increased, would negatively affect the domestic anti-inflationary policy.

President Hurtado of Ecuador has presented that country's Congress with a bill which would restructure the coffee export tax schedule in order to create a coffee fund. The fund would be used to stabilize domestic coffee prices, promote coffee production and establish a source of credit for growers. Revenues for the new stabilization fund would come from export taxes, plus a portion of the difference between production costs and export prices once the export prices, reach a certain level.

The following schedule of taxes has been proposed for green and roasted/-ground coffees of both the Robusta and Arabica varieties.

Registered contract price	Washed coffee	Unwashed coffee
Dollars/Kilogram	Percent	
3.3069 or higher	13	20
3.1967 to 3.3067	11	18
3.0865 to 3.1965	10	17
2,9762 to 3.0862	9	16
2.8660 to 2.9760	8	15
2.7558 to 2.8658	7	14
2.6455 to 2.7556	6	13
2.5353 to 2.6453	5	12
2.4251 to 2.5351	4	11
2.3149 to 2.4249	3	10
2.2046 to 2.3146	2	9
2.0062 to 2.2044	0	2
2.0060 or lower	0	0

The 1981/82 (April/March) coffee production estimate for Peru remains unchanged at 1.25 million bags, up 80,000 bags from the revised figure of 1.17 million bags for 1980/81. Output could reach 1.35 million bags in 1982/83 if producers expect returns which would encourage improved cultural practices.

Yields from the 1981/82 harvest, currently in various states of completion, are regarded as normal. The Ministry of Agriculture is continuing its effort to combat rust and "broca" diseases in coordination with cooperative organizations in the infected areas, but the success of the program has been diminished because the small independent growers do not participate.

Producer prices for "Tal Cual" coffee from northern Peru have been increased from S/.16,000-17,000 (US $37.20 to $40.70) per quintal, up from S/.14,000, while washed coffee from the central area is now S/.20,000 (US $46.51), up from S/.18,000.

Internal consumption of coffee in Peru is believed to have declined slightly from 250,000 bags in 1979/80 to 241,000 bags in 1980/81 due to the higher prices for coffee. Roasted/ground coffee in 225-gram bags retailed for the equivalent of US $2.56 per kilogram, while a 50-gram can of soluble sold for the equivalent of 85 US cents. One year ago, the prices were equivalent to $3.25 and $1.03.

Coffee shipments during 1980/81 totaled 909,000 bags, down substantially from the 1,052,000 bags shipped in 1979/80 due to the smaller harvest and restrictive ICO export quotas. Peru's exportable production for 1981/82 is estimated at 980,000 bags, while actual exports may only reach about 900,000 bags, resulting in a buildup in carryover stocks.

Year-end stocks are estimated at 190,000 bags, 50 percent held in official warehouses and 50 percent by producers. The higher than normal producer-held stocks is partly due to the heavy rains in the mountains, which rendered many evacuation roads to Lima impassable. Stock levels are expected to rise to 280,000 bags by the end of Peru's 1981/82 crop year, March 31, 1982. The Coffee Fund, currently valued at about US $20 million may be utilized to finance the carryover of stocks at the rate of 15,000 pesos per quintal (US $34.88).

In an effort to compensate the grower for the drop in international coffee prices, the government has reduced the export tax from 17.5 percent to 12.5 percent. The tax will gradually be eliminated by 1984. Also, exports to non-member importing countries will be exempt from the export tax through the end of 1981. Although coffee exports are presently under government controls, there are indications the private sector may play a more important role in the future.

Africa

The second estimate of total coffee production in Africa for 1981/82 is 19.4 million bags, with exportable production at 16.7 million bags. This is 438,000 bags more than the initial USDA estimate for 1981/82, with the increases occurring in Burundi, up 50,000 bags from the first estimate at 530,000 bags; Cameroon up 190,000 bags at 1.79 million bags and Tanzania up 100,000 bags at 1.1 million bags. The total also includes 90,000 bags for Zimbabwe.

Significiant revisions were made in 1980/81 estimates, with overall production now estimated at 19.9 million bags. More complete data on trade and stocks suggest larger harvests in Angola, Kenya and Tanzania. The estimate for Ivory Coast also has been increased substantially.

At 530,000 bags, Burundi's record 1981/82 (April/March) coffee harvest is expected to be even larger than previously estimated and nearly 200,000 bags above 1980/81. This would normally be welcome news, since coffee contributes about 90 percent of the country's foreign exchange earnings, but low prices and the extremely difficult problems of evacuating the coffee through Tanzania pose considerable problems.

Burundi officials refused to load uncontainerized coffee on open railroad flat cars because of the high losses incurred in transit through Tanzania. Burundi has considered the need for a waiver in the September 30 deadline for 1980/81 shipments, in order to meet its quota for the year. Also air transportation has been considered to expedite shipments.

Cameroon's 1981/82 (October/September) coffee crop is now estimated at 1.79 million bags, up substantially from the first estimate for the year of 1.6 million bags. The increase reflects the good weather conditions in the coffee areas during the growing season. If the 1.79-million bag-level is reached, it could be expected to include about 1.33 million bags of Robusta and 460,000 bags of Arabica.

The production estimate for 1980/81 also has been revised upwards by 150,000 bags to 1.75 million bags.

USDA's estimate of the 1981/82 (October/September) Ivory Coast coffee crop remains unchanged at 280,000 tons or 4.667 million bags, down 600,000 bags from the revised figure of 5.333 million bags for 1980/81. The quality of the 1980/81 crop is reported to be poorer than in 1979/80, as evidenced by an increase from 3 to 10 percent in the percentage of black beans. Excessive amounts of foreign materials are delivered by many producers in an effort to add weight. The government is considering new procedures for the coming year to upgrade the quality of the cherries accepted at decortication plants.

Ivory Coast coffee exports are now expected to total about 3.6 million bags during 1980/81, up more than 250,000 bags from the preceding year, but well below the 5.5 million bags exported during 1975/76. Although there has been no official announcement, it is believed the government has stopped subsidizing inputs such as fertilizer, insecticides and pesticides in order to discourage further growth in coffee production at this time.

Because of the increase in production expected from new trees and larger than expected cherry settings on old trees, a record 1.587-million-bag coffee crop is still in prospect for Kenya in 1981/82 (October/September). This is 6 percent above the current estimate for 1980/81, which has been raised by 50,000 bags to 1.503 million bags. The area planted to coffee in 1981/82 is expected to total 130,000 hectares, up 3,000 hectares from 1980/81. There are indications that continued low coffee prices and the inability of the Board to make prompt payment to the farmers would reverse the trend towards an expanded coffee area and the higher yields which have prevailed over the past several years.

In order to reduce the pressure of excess production and fund payments to financially hard pressed farmers, the Kenyan Coffee Board has sought to expand sales to non-quota markets, even to the extent of offering coffee under barter arrangements. These efforts have met with only limited success. Sales to non-quota markets were not expected to total over 55,000 bags during 1980/81.

Coffee Board officials had not anticipated a fourth quota cut for coffee year 1980/81 and had their entire authorization, based on only three cuts, sold prior to June 30. As a result export authorizations equal to the fourth cut were transferred to the October/December quarter of coffee year 1981/82.

The export deadline for licensed coffee exports for quota and non-quota markets for July/September of coffee year 1980/81 was set for September 15, 1980 in order to earn badly needed foreign exchange as soon as possible, as well as insure there would be no carryover loss of quota. Shipment of some 1979/80 sales occurred after September 30, 1980, forcing Kenya to cover these shipments with ICO stamps from the first quarter of coffee year 1980/81.

Based on Kenya's inability to gain a larger quota for ICO coffee year 1980/81, or make substantial new sales in non-quota markets, Kenya will end coffee year 1980/81 with stocks totaling about 870,000 bags. Stock levels could rise to an extremely burdensome 1.065-million bags by the end of 1981/82, if Kenyan sales remain at the 1980/81 level.

Not only were coffee shipments down during 1980/81, but so were the prices received, reaching a low of 1,136 Kenyan pounds per ton on July 21. News of the coffee freeze in Brazil pushed coffee prices up by 300 Kenyan pounds per ton by July 28 and further price increases were anticipated at that time.

Coffee production in Madagascar is estimated at 1.4 million bags for 1981/82, up 50,000 bags from the preceding year. About 50,000 bags are Arabica; the balance Robusta.

According to the best estimates available, the area in coffee since 1979 has grown as follows.

	1979	1980	1981
		In hectares	
Robusta	216,000	223,000	225,000
Arabica	5,450	6,550	7,650
	221,450	229,550	232,650

Almost 98 percent of the country's coffee trees are located on small, unfertilized plots. As a result, yields are low, averaging only 250 to 300 kilograms per hectare.

During the period 1976/77-1978/79, producer prices for coffee were deliberately held well below world market levels as a means of guaranteeing larger revenues for the government. Producer returns fell from 65 percent of the export price in early 1970's to 31 percent in 1979. At that time, the government became aware of the dampening effect low producer prices were having on production and substantially raised them, nearly to the equivalent of US$1 per pound. As a result, much larger harvests were realized or anticipated from the 1979/80-1981/82 crops.

Domestic coffee consumption at the present time in Madagascar is believed to take about 160,000 to 170,000 bags, much of it consumed in producing areas. Commercial processing is carried out by four small roasting and grinding facilities. Consideration has been given to the construction of a soluble plant in the Mananjory region, but this is unlikely because of the small domestic market. Madagascar currently prohibits imports of soluble coffee.

Under the current marketing system, only the Coffee Stabilization and Marketing Board is authorized to export coffee. In practice, however, the Board gives export concessions to the large state trading companies (ROSO, COROL SICE SOMACODIS, SINPA and SONACO) which do the actual exporting. Most (90 to 95 percent) of Madagascar's coffee bean exports occur under contract based on international prices at the time of the sales. The bulk of such sales contracts are with member countries of the ICO. Sales to non-member Arab countries, such as Algeria, occur under "free-market" arrangements at what are claimed to be very favorable prices. Coffee bound for the Soviet Union and some Eastern European countries is usually bartered against debts for transport and military equipment.

Because Madagascar has not yet developed a good road system, evacuation of producer held stocks to the nearest port is generally slow. Carryover stock levels, including an estimated 200,000 bags held by the producers, should rise from about 686,000 bags on April 1, 1981, to 716,000 bags on April 1, 1982.

Madagascar lacks a realistic policy to improve its coffee sector. The task of expanding coffee acreage has been assigned to the Military Office for Agricultural Production (OMIPRA). As yet, there has been no expansion. The government encourages the use of fertilizer for coffee but fertilizer is not available. External French assistance efforts are being directed toward research, with higher yields as a major goal. The European Development Fund has a $1.5 million project to improve Arabica cultivation in the highlands.

Timely rains during the growing season, and a larger number of trees coming into production, have combined to push crop prospects for 1981/82 (July/June) in Tanzania to 1.1 million bags, up about 10 percent from the revised estimate of 1.0 million bags for 1980/81. The larger output, especially in the mild Arabica area, will push output close to the 1.123-million-bag record set in 1972/73. If weather conditions are normal, Tanzania's coffee production should continue to grow over the next five years as the newly planted trees progress towards peak productivity.

Output from the 1980/81 harvest was higher than estimated, especially in the Kilimanjaro/Arusha area because of good growing conditions, and because improved farm prices have stimulated a more complete harvest of the coffee cherries, especially from the marginally productive trees. Crop quality from the 1980/81 harvest also was considered to be better than from the smaller 1979/80 harvest.

In an effort to maximize export sales and, increase foreign exchange earnings, the Ministry of Agriculture, on March 27, 1981, abolished coffee export taxes and increased producer prices, retroactive to February to the following levels:

Arabica	11.00 T. Shillings/kg
Robusta	9.50 T. Shillings/kg
Undergrade	6.00 T. Shillings/kg
Cherries	4.20 T. Shillings/kg

As a result of these actions, the Coffee Authority of Tanzania is reported to have purchased a record 65,000 metric tons or nearly 1.1 million bags for the 1980/81 crop season, compared with 48,000 tons or 800,000 bags the preceding year.

Although firm information is not available, industry sources believe coffee exports during 1980/81 (July/June) may have totaled only 50,000 tons or 830,000 bags. This was the result of delayed processing due to equipment breakdowns and power failures of some Robusta and Arabica from the western part of the country. Most shipments were destined for traditional markets in the European Community, Japan, United States, Algeria and Yugoslavia.

EC support for Tanzania's Coffee Industry Development Program (CIDP) began four years ago and has been extended for another four years. During this period, the EC will provide 400 million shillings to cover external financing of the project and the government of Tanzania will allocate 500 million shillings for local costs. The CIDP goal is to increase present coffee acreage from 195,000 to 237,000 hectares by 1985/86 and output from 60,000 tons in 1980/81 to 80,000 tons by 1985/86. Much of the government's efforts are directed toward small farmers to increase output by 200 kilograms/hectare, up from the average 300 killograms/hectares harvest currently realized.

The CIDP also covers equipment, research, estate revitalization, improved input supply, extension programs and work shops. Most of the new plantations devoted to coffee will be in the southern part of the country (Mbeya, Rwuma and Iringa) the western part (Mara and Kagera) and the Rukwa region of the country.

Asia and Oceania

Coffee production in Asia and Oceania is expected to total 10.0 million bags in 1981/82, up 465,000 bags from the preceding season and 256,000 bags above the first estimate for the year. Exportable production was up 355,000 bags between 1980/81 and 1981/82, to about 7.1 million bags.

Coffee production estimates for Indonesia remain unchanged for 1980/81 and 1981/82 (April/March) at 5.162 and 5.420 million bags, respectively. Indonesia was among the coffee producing countries aggressively seeking a larger ICO export quota for coffee year 1981/82, because it regards the 1980/81 quota as very low in comparison to its export potential. Indonesia is now the third or fourth largest coffee exporter in the world, compared with tenth place a decade ago. Export quota cutbacks in 1980/81 led to a sharp decline in domestic market prices, severely hurting producers, most of which are small. Farm level coffee prices have fallen to around 35 cents per pound from $1 last year, and are regarded by some as being below production costs. Indonesia has tried to improve the quality of its export coffee, which often varies significantly from shipment to shipment.

In the Philippines, extensive plantings during 1978 and 1979, when coffee prices were high, will begin producing in 1981/82. This will raise output for the year to an estimated 835,000 bags, 9 percent above the 768,500 bags expected from the 1980/81 crop. Production in 1980/81 exceeded consumption and exports, resulting in a sharp increase in inventories--from about 113,585 bags on October 1, 1980, to about 174,870 bags on September 30, 1981. With another large crop in prospect for 1981/82, the continued accumulation of stocks is anticipated. Many of the new plantings are concentrated in Mindanao, which has had ideal weather conditions for coffee production over the past year, as well as southern Luzon, the second major producing area. In contrast to many coffee growing countries, where new plantings have been made at substantially increased densities, growers in the Philippines have continued to plant trees at the rate of about 930 per hectare. The goal is to increase tree yields in order to reduce production costs per unit.

Although grower prices for green coffee have declined 35 percent for Arabica and 50 percent for Robusta since mid-1979, they are still generally attractive. However, any furthur decline would discourage new plantings and gradually curtail the use of production inputs.

Exports of green coffee from the Philippines in 1979/80 totaled about 280,000 bags, including the GBE of over 7,000 bags of soluble. The United States was the principle market, taking over 170,000 bags or 62 percent of the total.

Exports during the first eight months of 1980/81 had already exceeded the preceding year's total by 3 percent and were expected to reach 325,000 bags or more for the year, including at least 50,000 bags to non-quota markets. Exports are expected to reach about 360,000 bags during 1981/82, including 10,000 bags (GBE) of soluble. Green coffee exports from the Philippines were valued at $44.6 million during calendar 1980. When the $2 million realized from the sales of solubles are included, earnings from coffee account for 2.4 percent of total earnings from agricultural exports.

The rapid increase in per capita consumption of coffee, which occurred between 1977/78 and 1979/80, was not expected to continue in 1980/81 due to inflation and the continuing high prices for coffee products. Eighty to 85 percent of Philippine consumption occurs in the instant or soluble form.

Historically, the Philippine coffee industry has been very self-reliant. The only government assistance the industry has received has come through a special coffee financing program of the Development Bank.

International Coffee Organization

On September 25, 1981, the last day of an extended session, the International Coffee Council reached agreement on a coffee export quota system for coffee year 1981/82, beginning October 1, 1981. The major element of the agreement was to establish a global export quota for the year of 56.0 million 60 kilogram bags, including 53.2 million bags for members entitled to a basic quota and 2.8 million bags for members exempt from basic quotas. Members of each group and respective quotas are shown in Tables 10 and 11.

Under the system, quotas are automatically adjusted pro rata to exporting members entitled to basic quotas at specified price levels based on a fifteen-day moving average of the composite indicator price. Adjustments should be more rapid for 1981/82 than for 1980/81, when a twenty-day moving average indicator price was used.

The global quota can be reduced in stages down to 52 million bags, when the fifteen-day average indicator price is at, or below US$1.20. The quota also can be up to 60.6 million bags, if the indicator price is at, or above US$1.40. The 60.6 million bags includes 600,000 bags to be released if the average price at any time during the coffee year is at or above US$1.35.

A number of member countries declared unconditional shortfalls from their export entitlements for coffee year 1981/82. These shortfalls were redistributed among members with a basic quota. Angola, Brazil and Uganda declared shortfalls, which are subject to conditions. These also have been redistributed among members entitled to a basic quota.

The quarterly distribution of quotas for members entitled to a basic quota is calculated according to the provisions of Article 36 of the Agreement. This states that, as nearly as possible, quarterly quotas to each exporting member shall be 25 percent of its annual quota. This is to assure an orderly flow of coffee to world markets throughout the period for which quotas are set.

Member countries exempt from basic quotas that export between 100,000 and 400,000 bags are not subject to increases or reductions in annual and quarterly quotas, and may export their full entitlement for each quarter, after providing the Executive Director of the ICO acceptable evidence that they have sufficient coffee. Export members exporting less than 100,000 bags are exempt from quarterly quotas and may export their full entitlement at any time during the coffee year after presenting acceptable evidence that they have sufficient coffee for export.

The initial quota for the first quarter (October-December 1981) was set at 13 million bags. If on October 22, 1981, the fifteen-day moving average of the Composite Indicator Price is at or above US$1.15 per pound, the quarterly quota will be increased by 1.0 million bags. The additional quota will be distributed pro rata to members having a basic annual quota. Also, the 1 million bags will be transferred from the quotas of exporting members entitled to a basic quota for the second, third and fourth quarters (January-September 1982) to their quotas for the first quarter (October-December 1981). If on December 1, 1981, the fifteenth-day moving average of the Composite Indicator Price is at or below US$1.20 per pound, the provisions shown on Chart 1 will come into effect with the first of the reductions provided for in the system applied in the second quarter of coffee year 1981/82. Chart 2 provides the price quota system used for coffee year 1980/81 for comparison.

Any increases or reductions in the global annual quota will be applied, to the extent possible, in the same quarter in which they occur, but no more than two cuts or releases can be applied in the same quarter.

If quotas are suspended in coffee year 1981/82 because the fifteen-day moving average of the Composite Indicator Price remains above US$1.50 for two consecutive periods of fifteen market days, they can be reintroduced provided the indicator price is at or below US$1.35 per pound.

The Executive Director must release stamps equivalent to 80 percent of the quarterly quota ten days prior to the commencement of each new quarter. The balance must be released on the fifteenth-day of the second month of the quarter, less any downward adjustment in quotas which has taken place during the quarter, unless the Executive Board decides otherwise. The Executive Director also must immediately release to exporting members entitled to a basic quota export stamps corresponding to any increase in, restoration of or transfer of quotas. Export stamps for exporting members exempt from basic quotas will be released after presenting acceptable evidence to the Executive Director that they have sufficient coffee available for export.

Other decisions taken by the council included a one-year extension of the 1976 Coffee Agreement (to September 1983), with the provision that amendments proposed by January 31, 1982, be acted on by July 1, 1982.

U.S. Imports

U.S. Imports of green coffee in July reached 920,000 bags valued at $143 million, bringing total imports for January-July 1981 to 9.6 million bags valued at $1.61 billion. This is down 14.4 percent in volume and 36 percent in value from year earlier levels. The unit import value for August was $1.18 per pound, compared with $1.71 per pound for July 1980.

Based on January-June 1981 data, U.S. imports of coffee (GBE) from Brazil were above year earlier levels by 7 percent, or 156,000 bags, while imports from Africa and Asia were up 390,000 bags or 14.3 percent. Imports from Colombia declined 1,165,000 bags, while quantities coming from Mexico and Central America were 22.4 percent or 645,000 bags higher than in 1981.

According to Bureau of Census data, U.S. roastings of green coffee during January-June 1981 totaled 8,704,000 bags, compared with 8,320,000 bags for the first half of 1979. Calendar year 1980 roastings of 17,044,000 bags were 0.2 percent above total roastings in 1979. U.S. inventories of green coffee held by roasters, importers and dealers on June 30, 1981, were 2,590,000 bags, down 359,000 bags from the 2,849,000 bags held on March 31 and 417,000 bags from the inventories of 2,907,000 bags held on June 30, 1980.

Based on Bureau of Labor statistics, the wholesale price of a one-pound can of roasted coffee during June 1981 averaged $2.53, down from $3.04 one year earlier. Wholesale prices for a 6 ounce jar of instant coffee also declined from $3.17 in 1980 to $2.64 for the same month this year.

U.S. Coffee Consumption

Every year since 1950, with the exception of 1952, the ICO has sponsored a winter survey to determine the trends in consumption of coffee in the United States. According to the winter of 1981 survey, an average 1.92 cups were consumed per person daily, compared with 2.02 cups per day in 1980 and 2.06 cups in 1979. Consumption has decreased nearly forty percent from 1962 when it was 3.12 cups each person per day. The decline in consumption between 1962 and 1981 is equal to 1.2 cups per person per day, or more than one-third. Consumption in 1981 at 1.92-cups was the lowest level recorded for any year, falling below the 1.92 cup level of 1977, which was related to the exceptionally high prices, following the 1975 Brazilian frost. Consumption increased in 1978 and 1979, compared with 1977. The drop in 1980 and 1981 appears to indicate a return to the long term downward consumption trend since 1962.

Approximately seven of every ten cups of coffee consumed in the United States are regular coffee. The decrease in daily consumption per person in 1981 occurred almost exclusively in soluble coffee, which decreased by 13 percent, compared with regular coffee consumption, which remained relatively unchanged. The percentage of persons drinking regular coffee increased by 1.1 percent between 1980 and 1981, whereas the percentage drinking soluble coffee decreased by 1.3 percent. However, the long-term decline in consumption has been in regular coffee. The trend in total U.S. coffee consumption, by type, is shown in the following table.

Daily Coffee Consumption Per Person, By Cups

	1962	1979	1980	1981
All Coffee 1/	3.12	2.06	2.02	1.92
Regular	2.45	1.42	1.39	1.38
Soluble	0.67	0.62	0.62	0.54

1/ The components may not total for all coffee since there is a small portion of coffee for which type is unknown.

Although per cup consumption has decreased in the past year, the percentage of persons drinking coffee in 1981 (56.4) was virtually unchanged from 1980 (56.6 percent). Compared with 1962 data the percentage of the population drinking coffee in 1981 has decreased by about 18 percent.

Coffee Consumption as Percentage of Population

	1962	1979	1980	198
All Coffee	74.7	57.2	56.6	56.4
Regular	59.3	37.0	37.3	38.4
Soluble	23.5	25.6	24.5	23.2

Although the number of coffee consumers remained relatively unchanged in 1981, each consumer drank about 4 percent less coffee. The average drinker consumed just under three and one-half cups in 1981, a decrease of 0.16 cups from 1980. The decrease in 1981 was much more significant among consumers of soluble coffee, than for regular coffee.

The percentage of the population drinking decaffeniated coffee continued to increase in 1981. In 1962, only one in every 25 persons (4 percent) drank decaffeinated coffee, compared with one in every seven persons (14.6 percent) in 1981. Approximately two-thirds of decaffeniated coffee consumped is in soluble coffee form.

Coffee remains the most popular beverage in the United States and is consumed by 56.4 percent of the population. Surveys indicate this percentage has varied little in the past three years. However, there has been a significant decrease since 1962 when 74.7 percent of the population drank coffee. Soft drinks have advanced in popularity and are now consumed by 51.8 percent of the population, compared with 32.6 percent in 1962. Juices and tea also have been growing in popularity. The percentage drinking milk has decreased slightly.

Percentage of Population Consuming Specified Beverages

Beverage	1962	1979	1980	1981
Coffee	74.7	57.2	56.6	56.4
Tea	24.7	33.5	31.7	32.6
Milk	53.6	51.2	50.5	50.4
Soft Drinks	32.6	53.0	51.1	51.8
Juices	41.4	43.9	45.2	47.5

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TABLE 1--COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1972/73-1976/77, ANNUAL 1977/78-1981/82
(IN THOUSANDS OF 60 KILO BAGS) 2/

REGION AND COUNTRY	AVERAGE 1972/73-1976/77	1977/78	1978/79	1979/80	1980/81	1981/82
NORTH AMERICA:						
COSTA RICA	1,368	1,449	1,749	1,507	2,038	1,875
CUBA	448	375	325	300	300	300
DOMINICAN REPUBLIC	854	1,025	767	889	850	800
EL SALVADOR	2,642	2,700	3,423	3,122	2,376	2,214
GUATEMALA	2,225	2,550	2,827	2,647	2,450	2,600
HAITI	554	519	443	664	460	550
HONDURAS	792	1,036	1,132	1,140	1,380	1,500
JAMAICA	25	23	14	34	27	30
MEXICO	3,742	3,401	4,042	3,600	3,650	3,850
NICARAGUA	718	967	1,004	1,009	950	900
PANAMA	75	101	108	102	117	115
TRINIDAD-TOBAGO	49	41	39	36	33	41
US-HAWAII	15	14	10	13	9	16
US-PUERTO RICO	187	199	159	183	234	217
TOTAL NORTH AMERICA	13,694	14,400	16,042	15,246	14,874	15,008
SOUTH AMERICA:						
BOLIVIA	102	118	122	137	145	165
BRAZIL	19,720	17,500	20,000	22,000	21,500	32,500
COLOMBIA	8,640	11,050	12,600	12,712	14,000	14,500
ECUADOR 3/	1,274	1,302	1,833	1,584	1,362	1,525
GUYANA	14	17	17	20	19	17
PARAGUAY	94	71	144	40	116	175
PERU	1,018	1,050	1,130	1,265	1,170	1,250
VENEZUELA	913	1,061	1,011	1,007	1,073	1,035
TOTAL SOUTH AMERICA	31,775	32,169	36,857	38,765	39,385	51,167
AFRICA:						
ANGOLA	2,557	1,047	648	300	430	400
BENIN	23	3	3	5	5	5
BURUNDI	361	285	387	466	333	530
CAMEROON	1,505	1,371	1,627	1,658	1,750	1,790
CENTRAL AFRICAN REPUBLIC	167	165	180	215	235	220
CONGO, BRAZZAVILLE	19	46	107	43	58	65
EQUATORIAL GUINEA	102	80	90	100	100	110
ETHIOPIA	2,530	3,143	3,142	3,088	3,100	3,200
GABON	6	3	6	8	8	5
GHANA	65	32	31	38	33	36
GUINEA	48	16	59	34	75	65
IVORY COAST	4,599	3,393	4,616	4,120	5,333	4,666
KENYA	1,304	1,417	1,239	1,625	1,503	1,587
LIBERIA	95	137	144	148	135	125
MADAGASCAR	1,133	1,292	814	1,313	1,350	1,400
NIGERIA	50	43	50	50	52	52
RWANDA	416	362	311	501	527	400
SIERRA LEONE	119	77	230	172	190	167
TANZANIA	864	835	856	907	1,000	1,100
TOGO	174	82	105	182	160	170
UGANDA	3,131	1,868	1,823	2,082	2,000	1,900
ZAIRE (CONGO,K)	1,376	1,129	1,300	1,231	1,400	1,300
ZIMBABWE	53	71	77	88	85	95
TOTAL AFRICA	20,695	16,897	17,845	18,374	19,862	19,388
ASIA:						
INDIA	1,629	2,147	1,842	2,600	2,175	2,250
INDONESIA	2,773	3,911	4,788	4,803	5,162	5,420
MALAYSIA	109	132	143	145	148	152
PHILIPPINES	489	575	600	705	769	835
PORTUGUESE TIMOR 4/	68	75	--	--	--	--
THAILAND	93	163	233	210	300	319
VIETNAM	58	65	70	70	70	60
YEMEN, ARAB REP	47	48	50	53	57	60
TOTAL ASIA	5,265	7,116	7,726	8,586	8,681	9,096
OCEANIA:						
NEW CALEDONIA	25	25	25	25	25	25
PAPUA NEW GUINEA	625	767	740	844	850	900
TOTAL OCEANIA	650	792	765	869	875	925
WORLD TOTAL	72,078	71,374	79,235	81,840	83,677	95,584

1/ Coffee marketing year begins about July in some countries and in others about October. 2/ 132.276 pounds. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1981 in that country is shown as production for the 1981/82 marketing year. In Ecuador, however, this is referred to as the 1980/81 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

TABLE 2--COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1972/73-1976/77, ANNUAL 1977/78-1981/82
(IN THOUSANDS OF 60 KILO BAGS) 2/

REGION AND COUNTRY	AVERAGE 1972/73-1976/77	1977/78	1978/79	1979/80	1980/81	1981/82
NORTH AMERICA:						
COSTA RICA	1,204	1,264	1,533	1,296	1,794	1,640
CUBA	--	--	--	--	--	--
DOMINICAN REPUBLIC	574	755	487	604	560	505
EL SALVADOR	2,466	2,510	3,228	2,922	2,172	2,009
GUATEMALA	1,944	2,245	2,517	2,332	2,125	2,265
HAITI	329	304	228	444	235	330
HONDURAS	691	929	1,023	1,026	1,264	1,380
JAMAICA	10	16	5	22	14	16
MEXICO	2,240	2,001	2,935	2,310	2,200	2,370
NICARAGUA	641	887	921	926	866	815
PANAMA	12	34	40	36	48	45
TRINIDAD-TOBAGO	36	27	24	20	16	24
US-HAWAII	--	--	--	--	--	--
US-PUERTO RICO	--	--	--	--	--	--
TOTAL NORTH AMERICA	10,148	10,972	12,941	11,938	11,294	11,399
SOUTH AMERICA:						
BOLIVIA	75	87	89	103	111	130
BRAZIL	12,320	10,000	12,000	14,000	13,500	24,500
COLOMBIA	7,218	9,500	10,970	10,962	12,175	12,650
ECUADOR 3/	1,115	1,107	1,630	1,373	1,142	1,295
GUYANA	--	--	--	2	--	--
PARAGUAY	69	45	117	9	88	145
PERU	774	800	880	1,015	929	995
VENEZUELA	266	271	178	72	115	58
TOTAL SOUTH AMERICA	21,838	21,810	25,864	27,536	28,060	39,773
AFRICA:						
ANGOLA	2,468	972	568	220	345	315
BENIN	22	2	2	4	4	4
BURUNDI	358	282	384	463	330	527
CAMEROON	1,479	1,344	1,599	1,626	1,716	1,755
CENTRAL AFRICAN REPUBLIC	156	153	168	201	218	202
CONGO, BRAZZAVILLE	18	45	106	42	57	64
EQUATORIAL GUINEA	92	70	80	90	90	100
ETHIOPIA	1,052	1,354	1,342	1,255	1,250	1,325
GABON	5	2	5	7	7	4
GHANA	51	22	23	30	25	27
GUINEA	43	10	53	28	69	58
IVORY COAST	4,136	3,357	4,551	4,055	5,268	4,601
KENYA	1,277	1,367	1,181	1,562	1,428	1,522
LIBERIA	87	126	133	136	123	114
MADAGASCAR	993	1,152	666	1,158	1,184	1,230
NIGERIA	4	--	--	--	--	--
RWANDA	414	360	309	499	525	398
SIERRA LEONE	114	72	225	167	185	162
TANZANIA	839	814	836	887	975	1,077
TOGO	173	81	104	181	159	169
UGANDA	3,105	1,838	1,793	2,052	1,970	1,869
ZAIRE (CONGO,K)	1,227	954	1,120	1,041	1,205	1,100
ZIMBABWE	44	63	69	79	76	85
TOTAL AFRICA	18,158	14,440	15,317	15,783	17,209	16,708
ASIA:						
INDIA	880	1,297	1,034	1,757	1,260	1,300
INDONESIA	1,790	2,886	3,738	3,723	4,062	4,265
MALAYSIA	12	--	--	--	--	--
PHILIPPINES	89	250	242	315	389	435
PORTUGUESE TIMOR 4/	59	65	--	--	--	--
THAILAND	4	17	61	33	97	115
VIETNAM	28	30	35	35	35	25
YEMEN, ARAB REP	37	38	40	43	47	50
TOTAL ASIA	2,898	4,583	5,150	5,906	5,899	6,190
OCEANIA:						
NEW CALEDONIA	15	14	14	14	14	14
PAPUA NEW GUINEA	613	752	725	828	834	884
TOTAL OCEANIA	627	766	739	842	848	898
WORLD TOTAL	53,670	52,571	60,011	62,005	63,301	74,968

1/ Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. 2/ 132.276 pounds. 3/ As indicated in footnote. 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1981 in that country is shown as production for the 1981/82 marketing year. In Ecuador, however, this is referred to as the 1980/81 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

TABLE 3--WORLD COFFEE SUPPLY AND DISTRIBUTION,1960-1982

(IN 1,000 60-KG BAGS)

COUNTRY BY TIME PERIOD	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY DISTRIBUTN	DOMESTIC USE	EXPORTS				ENDING STOCKS
						BEANS	RSTD/GRND	SOLUBLE	TOTAL	
WORLD TOTAL										
1960/61.............	58,807	65,375	315	124,497	16,371	42,846	63	92	43,003	65,124
1961/62.............	65,124	75,951	279	141,354	21,074	45,959	56	135	46,151	74,129
1962/63.............	74,129	67,788	257	142,174	14,687	46,778	42	123	46,946	80,539
1963/64.............	80,539	65,340	182	146,061	17,616	50,884	69	118	51,071	77,372
1964/65.............	77,372	52,652	178	130,202	16,741	41,766	58	78	41,903	71,557
1965/66.............	71,557	82,156	249	153,962	17,804	49,669	37	257	49,965	86,190
1966/67.............	86,190	63,384	279	149,853	19,251	48,326	26	564	48,917	81,686
1967/68.............	81,686	70,882	273	152,841	18,072	54,936	55	741	55,733	79,041
1968/69.............	79,041	63,327	229	142,597	19,638	52,545	76	963	53,585	69,374
1969/70.............	69,374	69,734	267	139,375	18,890	53,881	84	1,161	55,125	65,360
1970/71.............	65,360	59,013	505	124,878	19,370	50,538	107	1,253	51,899	53,612
1971/72.............	53,612	73,728	524	127,864	19,049	56,694	258	1,589	58,542	50,271
1972/73.............	50,271	77,197	498	127,966	17,456	58,990	381	2,045	61,417	49,097
1973/74.............	49,097	66,215	563	115,875	19,125	58,354	163	2,149	60,665	36,085
1974/75.............	36,085	82,525	564	119,174	19,260	53,389	240	1,985	55,614	44,299
1975/76.............	44,299	72,866	505	117,670	18,912	57,284	394	2,164	59,845	38,916
1976/77.............	38,916	61,589	506	101,011	18,101	54,808	306	2,224	57,290	25,620
1977/78.............	25,620	71,374	574	97,568	18,938	47,653	175	893	48,720	29,910
1978/79.............	29,910	79,235	606	109,751	19,467	62,023	205	2,430	64,657	25,627
1979/80.............	25,627	81,840	625	108,092	20,121	59,262	236	2,444	61,944	26,027
1980/81.............	26,027	83,677	566	110,270	20,621	54,743	263	2,877	57,883	31,766
1981/82.............	31,766	95,584	557	127,907	20,899	58,198	283	3,141	61,622	45,386

NOTE: TOTAL MAY NOT ADD BECAUSE OF ROUNDING, -- DENOTES UNAVAILABLE, NEGLIGIBLE, OR ZERO

SEPTEMBER 1981

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION
COMMODITY PROGRAMS, FAS, USDA

TABLE 4--US COFFEE IMPORTS BY TYPE AND COUNTRY, COFFEE YEARS 1968/69-1973/74 1/
(IN 60 KILO BAGS)

Coffee Types and Country of Origin	1968/69	1969/70	1970/71	1971/72	1972/73	1973/74
COLOMBIAN MILDS						
COLOMBIA	2,463,114	2,746,224	2,719,452	2,466,060	2,698,763	3,543,876
KENYA	144,780	144,038	191,732	143,948	71,515	200,672
TANZANIA	255,714	227,263	294,735	188,540	302,118	167,428
TOTAL COLOMBIAN MILDS	2,863,608	3,117,525	3,205,919	2,798,548	3,072,396	3,911,976
OTHER MILDS						
BURUNDI	--	--	111,243	323,750	210,355	195,615
COSTA RICA	289,454	368,641	371,436	195,650	357,085	244,587
DOMINICAN REP.	252,203	390,468	378,441	405,375	569,769	453,537
ECUADOR	385,455	459,204	603,047	417,940	442,950	462,030
EL SALVADOR	476,476	686,489	728,199	412,929	1,066,146	805,705
GUATEMALA	778,862	824,518	915,272	556,999	1,187,444	963,916
GUAYANA	7,664	1,087	1,323	1,353	995	966
HAITI	70,849	62,962	126,433	138,147	98,033	111,623
HONDURAS	236,457	266,360	210,902	145,931	256,953	153,827
INDIA	75,146	99,817	106,110	112,802	202,139	134,794
MALAWI	--	--	223	292	--	102
MEXICO	1,114,102	1,213,864	1,208,279	1,198,028	1,825,264	1,196,189
NICARAGUA	175,169	147,966	187,595	91,241	173,628	51,445
PANAMA	500	4,140	10,403	5,417	9,221	--
PAPUA NEW GUINEA	68,476	164,881	163,117	118,703	198,148	198,305
PERU	481,417	522,114	512,007	442,645	470,757	340,009
RWANDA	--	--	63,718	239,498	120,267	331,119
VENEZUELA	233,818	272,527	279,934	231,232	169,930	287,726
YEMEN, ARAB REP.	--	--	--	2,690	62	663
TOTAL OTHER MILDS	4,646,050	5,490,038	5,977,682	5,040,622	7,358,146	5,932,358
UNWASHED ARABICAS						
BOLIVIA	7,995	23,644	11,087	46,062	30,857	4,605
BRAZIL	6,830,591	5,705,023	6,761,857	6,680,145	5,698,835	4,453,667
ETHIOPIA	698,942	1,255,475	1,177,441	940,085	972,047	668,538
PARAGUAY	27,731	31,365	2,055	24,989	19,863	1,500
TOTAL UNWASHED ARABICAS	7,565,259	7,015,507	7,952,440	7,691,281	6,721,602	5,128,310
ROBUSTAS						
ANGOLA	1,247,585	1,466,790	1,589,587	1,267,998	1,677,651	2,705,688
CAMEROON	341,419	398,637	424,166	296,838	408,886	279,958
CENTRAL AFRICAN REPUBLIC	97	597	--	--	--	--
CONGO, BRAZZAVILLE	--	--	9,640	4,825	950	--
EQUATORIAL GUINEA	--	--	7,569	11,952	15,909	4,197
GABON	--	--	--	--	--	16,773
GHANA	10,013	5,081	--	1,253	10,941	--
GUINEA	158,149	84,360	111,993	33,788	23,363	--
INDONESIA	873,383	830,595	1,037,006	585,026	768,169	998,083
IVORY COAST	1,002,113	1,039,678	1,318,793	901,405	1,160,654	967,234
LIBERIA	50,918	54,828	57,719	45,737	74,875	36,985
MADAGASCAR	--	--	339,165	314,805	330,961	407,941
MALAYSIA	--	50,095	112,538	85,153	23,943	48,738
NIGERIA	6,467	29,569	17,904	1,285	8,472	1,204
PHILLIPINES	--	--	16,767	18,182	2,650	3,081
SIERRA LEONE	59,817	68,309	88,385	93,601	93,288	26,284
THAILAND	--	--	--	--	4	46
TOGO	3,877	2,434	827	--	41,634	41,634
TRINIDAD AND TOBAGO	32,588	28,285	44,185	19,819	25,770	3,474
UGANDA	940,011	1,053,630	890,364	706,521	966,024	1,090,156
ZAIRE	155,984	208,862	363,240	174,323	339,831	346,080
TOTAL ROBUSTAS	4,882,421	5,321,750	6,429,848	4,562,513	5,973,975	6,977,554
OTHER COUNTRIES 2/	808,024	1,008,018	645,965	270,390	555,721	759,171
WORLD TOTAL	20,765,362	21,952,838	24,211,854	20,363,354	23,681,840	22,709,369

1/ Includes green bean equivalent (GBE) of roasted/ground and soluble coffee imports.

2/ Almost entirely from non-producing countries in Western Europe.

SOURCE: Bureau of the Census

TABLE 5-- US COFFEE IMPORTS BY TYPE AND COUNTRY, COFFEE YEARS 1974/75-1979/80 1/
(IN 60 KILO BAGS)

Coffee Types and Country of Origin	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
COLOMBIAN MILDS						
COLOMBIA	3,153,191	2,911,523	2,129,978	2,632,236	3,993,913	3,816,391
KENYA	226,942	234,223	168,652	175,373	60,080	51,186
TANZANIA	262,714	233,729	196,285	352,441	192,581	64,784
TOTAL COLOMBIAN MILDS	3,642,847	3,379,475	2,494,915	3,160,050	4,246,574	3,932,361
OTHER MILDS						
BURUNDI	200,525	141,650	135,158	124,851	249,452	185,864
COSTA RICA	244,590	193,533	256,978	356,631	475,767	345,719
DOMINICAN REP	491,850	697,266	488,052	735,132	390,056	619,760
ECUADOR	742,652	624,054	655,113	882,030	836,615	535,073
EL SALVADOR	1,381,357	904,539	1,247,415	415,602	1,259,946	1,139,034
FRENCH WEST INDIES	--	--	3,062	--	--	--
GUATEMALA	953,150	709,574	804,545	939,084	1,170,851	1,151,763
GUAYANA	1,112	--	--	--	--	1,908
HAITI	91,604	164,235	77,337	95,390	23,390	69,574
HONDURAS	426,660	306,434	214,053	536,880	510,701	378,690
INDIA	179,795	273,897	135,860	246,560	332,229	197,060
JAMAICA	--	709	325	564	155	563
MALAWI	--	--	810	--	250	1,000
MEXICO	1,598,670	2,058,689	1,613,093	1,297,613	2,148,016	1,629,805
MOZAMBIQUE	--	--	--	249	--	249
NICARAGUA	98,846	151,255	101,334	169,065	180,848	194,996
PANAMA	13,122	84,091	103,457	44,386	29,881	46,977
PAPUA NEW GUINEA	165,629	205,747	198,623	159,920	146,212	88,285
PERU	445,388	424,876	445,741	626,466	790,490	761,268
RWANDA	285,656	350,106	188,924	251,363	112,419	319,145
PORTUGESE TIMOR	--	13	--	--	--	--
VENEZUELA	125,286	321,713	154,848	201,956	183,243	37,437
YEMEN, ARAB REP	643	952	1,159	379	--	273
ZIMBABWE	--	--	--	1,254	--	--
TOTAL OTHER MILDS	7,546,575	7,613,333	6,825,887	7,085,375	8,840,521	7,704,443
UNWASHED ARABICAS						
BOLIVIA	25,701	15,224	13,956	27,370	32,124	23,439
BRAZIL	4,767,494	3,664,928	4,621,162	2,647,785	3,854,745	3,681,942
ETHIOPIA	369,964	814,857	317,561	432,917	530,527	449,591
PARAGUAY	4,047	15,134	8,282	127,290	549,305	428,371
TOTAL UNWASHED ARABICAS	5,167,206	4,510,143	4,960,961	3,235,362	4,966,701	4,583,343
ROBUSTAS						
ANGOLA	754,088	1,389,662	7,554	214,917	172,295	124,515
BENIN	--	7,738	--	--	--	--
CAMEROON	155,801	145,041	104,401	182,289	163,623	226,213
CONGO, BRAZZAVILLE	--	418	--	--	--	497
GABON	--	10,457	--	--	--	--
GHANA	8,771	4,234	1,271	--	--	--
GUINEA	424	--	5,181	--	366	799
INDONESIA	547,422	1,246,962	860,940	926,073	1,545,609	1,151,699
IVORY COAST	662,138	1,467,215	837,572	606,521	885,112	523,152
LIBERIA	45,160	55,950	55,312	79,539	52,551	55,875
MADAGASCAR	342,971	332,270	240,469	408,134	263,540	290,884
MALAYSIA	500	755	5,065	2,935	1,667	5,933
NIGERIA	--	15,077	--	--	--	--
PHILLIPINES	--	42,341	6,319	53,487	87,144	178,174
SIERRA LEONE	85,109	41,264	50,097	60,393	125,386	61,922
SRI LANKA	--	5,333	--	667	254	584
THAILAND	101	51	173	835	28	113
TOGO	--	--	--	11,668	--	--
TRINIDAD AND TOBAGO	21,915	10,738	4,158	10,917	5,265	1,367
UGANDA	840,753	916,218	1,141,280	562,285	141,533	752,076
ZAIRE	235,905	205,860	398,547	498,343	178,028	132,514
TOTAL ROBUSTAS	3,700,998	5,896,079	3,718,439	3,619,503	3,623,521	3,506,217
OTHER COUNTRIES 2/	364,275	432,983	375,275	117,512	192,907	365,271
WORLD TOTAL	20,421,901	21,832,013	18,375,477	17,217,802	21,870,224	20,091,635

1/ Includes green bean equivalent (GBE) of roasted/ground and soluble coffee imports.

2/ Almost entirely from non-producing countries in Western Europe.

SOURCE: Bureau of the Census

TABLE 6--U.S. COFFEE: PERCENT OF TOTAL COFFEE 1/
IMPORTS BY TYPE 1968/69-1980/81
(PERCENT)

Year	Colombian Milds	Other Milds	Unwashed Arabicas	Robustas	Others 2/	Total
1968/69	13.8	22.4	36.4	23.5	3.9	100.0
1969/70	14.2	25.0	32.0	24.2	4.6	100.0
1970/71	13.2	24.7	32.8	26.6	2.7	100.0
1971/72	13.7	24.8	37.8	22.4	1.3	100.0
1972/73	13.0	31.1	28.4	25.2	2.3	100.0
1973/74	17.2	26.1	22.6	30.7	3.4	100.0
1974/75	17.8	37.0	25.3	18.1	1.8	100.0
1975/76	15.5	34.9	20.7	27.0	1.9	100.0
1976/77	13.6	37.2	27.0	20.2	2.0	100.0
1977/78	18.4	41.1	18.8	21.0	.7	100.0
1978/79	19.4	40.4	22.7	16.6	.9	100.0
1979/80	19.6	38.3	22.8	17.5	1.8	100.0
1980/81 3/	12.6	37.0	28.3	20.7	1.4	100.0

1/ Includes green bean equivalent (GBE) of roasted/ground and soluble coffee imports.

2/ Type of coffee unknown, since imports are almost entirely from non-producing countries in Western Europe.

3/ October 1980-July 1981.

SOURCE: Bureau of Census

TABLE 7-- U.S. COFFEE IMPORTS BY TYPE AND COUNTRY OF ORIGIN, OCTOBER 1980-JULY 1981 1/
(IN 60 KILO. BAGS)

Colombian Milds	
Colombia	1,784,039
Kenya	107,400
Tanzania	26,387
Total	1,917,826
Other Milds:	
Burundi	154,902
Costa Rica	221,081
Dominican Republic	453,399
Ecuador	573,190
El Salvador	956,439
French West Indies	0
Guatemala	661,859
Guyana	2,396
Haiti	35,163
Honduras	277,725
India	338,524
Jamaica	534
Malawi	0
Mexico	1,035,811
Mozambique	1,632
Nicaragua	151,810
Panama	36,684
Papua New Guinea	40,982
Peru	531,467
Rwanda	138,497
Venezuela	25,173
Yemen Arab Republic	333
Zimbabwe	7,250
Total	5,644,851

Unwashed Arabicas:	
Bolivia	9,890
Brazil	3,772,123
Ethiopia	438,020
Paraguay	101,062
Total	4,321,095
Robustas:	
Angola	20,630
Benin	0
Cameroon	235,629
Congo	0
Gabon	0
Ghana	1,697
Guinea	17,665
Indonesia	1,151,859
Ivory Coast	465,827
Liberia	33,974
Madagascar	260,632
Malaysia	21,714
Nigeria	0
Philippine	253,621
Sierra Leone	34,729
Sri Lanka	750
Thailand	17,004
Togo	0
Trinidad/Tobago	0
Uganda	394,528
Zaire	255,551 2/
Total	3,165,810
Other Countries	211,131
World Total	15,260,713

1/ Includes green bean equivalent (GBE) of roasted/ground and soluble coffee imports.
2/ Almost entirely from non-producing countries in Western Europe.

SOURCE: Bureau of Census.

Table 8--GREEN COFFEE: U.S. GROSS IMPORTS FOR CONSUMPTION BY MONTHS, 1977-1981
(In bags 1/)

Month/year	1977	1978	1979	1980	1981 2/
January	1,994,147	1,682,045	1,747,330	2,020,173	1,857,689
February	1,706,674	1,574,583	1,353,257	1,366,172	1,738,030
March	1,839,178	1,707,452	1,630,811	1,420,672	1,394,581
April	1,824,133	1,556,739	2,036,535	1,642,305	1,298,675
May	1,223,533	1,345,237	1,618,619	1,566,286	1,355,898
June	1,136,816	1,249,290	1,617,283	1,663,358	1,026,215
January-June	9,724,481	9,115,346	10,003,835	9,678,966	8,671,088
July	755,821	1,315,844	1,596,934	1,533,391	3/
August	695,029	1,123,721	1,404,349	1,385,806	3/
September	678,095	1,337,360	1,631,848	1,062,275	3/
October	635,077	1,901,294	1,273,073	1,291,583	3/
November	971,964	1,688,512	1,592,806	1,485,956	3/
December	1,347,223	1,650,700	1,893,238	1,715,071	3/
July-December	5,083,209	9,017,431	9,392,248	8,474,082	3/
Calendar year total	14,807,690	18,132,777	19,396,083	18,153,048	3/
July-June year total	18,746,441	14,198,555	19,021,266	19,071,214	17,145,170
ICO year total 4/	16,373,216	15,846,535	19,877,472	18,419,555	3/

1/ 132.276 lbs. or 60 kilograms.
2/ Preliminary.
3/ Not available.
4/ Year ending September 30 of year shown. ICO is International Coffee Organization.

SOURCE: U.S. Department of Commerce, Bureau of Census.

Table 9--ICO COMPOSITE DAILY INDICATOR PRICE (1976 AGREEMENT)
(U.S. CENTS PER POUND EQUIVALENT)

Date	April		May		June		July		August		September	
	Daily	20-day moving Average	Daily	20-day moving Average	Daily	20-day moving Average	Daily	20-day moving Average	Daily	20-day moving Average	Daily	20-day moving Average
1.....	121.92	120.04	121.34	120.47	109.92	116.58	94.25	96.66	--	--	95.63	106.34
2.....	122.03	120.16	--	--	110.59	116.07	93.50	96.07	--	--	100.38	106.00
3.....	121.75	120.27	--	--	109.46	115.53	--	--	111.13	106.03	102.54	105.68
4.....	--	--	120.84	120.42	105.25	114.77	--	--	109.88	106.95	102.96	105.48
5.....	--	--	120.25	120.42	105.67	114.03	--	--	107.13	107.69	--	--
6.....	120.38	120.38	120.54	120.41	--	--	93.59	95.47	108.92	108.51	--	--
7.....	120.63	120.51	120.34	120.40	--	--	91.50	94.89	107.04	109.12	--	--
8.....	120.59	120.65	120.54	120.43	103.00	113.15	92.29	94.59	--	--	102.46	105.17
9.....	119.84	120.77	--	--	98.25	112.03	92.54	94.16	--	--	104.21	104.95
10....	119.79	120.84	--	--	101.25	111.06	94.84	93.93	108.63	109.74	105.59	104.74
11....	--	--	120.71	120.50	99.42	110.08	--	--	108.63	110.40	106.88	104.33
12....	--	--	120.63	120.60	101.63	109.25	--	--	109.75	111.09	--	--
13....	118.29	120.84	119.13	120.62	--	--	96.21	93.66	115.00	112.01	--	--
14....	118.75	120.90	118.09	120.55	--	--	95.54	93.38	113.84	112.84	107.21	104.00
15....	119.42	120.95	116.09	120.36	101.17	108.51	95.96	93.29	--	--	106.88	103.68
16....	119.92	120.94	--	--	97.75	107.69	96.63	93.26	--	--	105.78	103.49
17....	--	--	--	--	97.13	106.93	97.21	93.28	113.25	113.48	108.59	103.44
18....	--	--	114.04	120.06	96.88	106.09	--	--	109.54	113.38	111.54	103.66
19....	--	--	112.46	119.68	97.17	105.22	--	--	109.71	113.10	--	--
20....	119.92	120.95	113.67	119.34	--	--	100.50	93.45	107.40	112.54	--	--
21....	120.17	120.87	114.54	119.03	--	--	111.50	94.36	105.86	112.02	--	--
22....	120.50	120.78	113.92	118.67	93.25	104.19	115.34	95.63	--	--		
23....	120.63	120.69	--	--	90.00	103.00	118.21	97.03	--	--		
24....	121.13	120.64	--	--	90.17	101.75	116.13	98.31	104.67	111.34		
25....	--	--	--	--	90.38	100.54	--	--	104.00	110.46		
26....	--	--	113.67	118.26	89.96	99.42	--	--	101.13	109.40		
27....	122.00	120.64	115.25	117.91	--	--	118.38	99.74	100.96	108.64		
28....	122.13	120.61	114.54	117.58	--	--	121.50	101.34	99.21	107.77		
29....	121.21	120.55	112.46	117.15	89.50	98.39	122.42	102.90	--	--		
30....	120.96	120.50	--	--	91.09	97.42	116.25	104.00	--	--		
31....					--	--	116.59	105.16	96.79	107.05		
Ave...	120.57	120.64	117.15	119.64	98.59	107.80	104.13	96.57	107.26	110.17		

Note: Dashes denote weekends and holidays.

TABLE 10
COFFEE YEAR 1981/82
ANNUAL QUOTAS
(000 bags)

Exporting Member	Minimum quota	Annual quota	Maximum quota
TOTAL	52,000	56,000	60,672
A. Sub-total: Members Entitled to a basic quota		53,200	
Colombian Milds		10,885	
Colombia		8,671	
Kenya		1,400	
Tanzania		814	
Other Milds		13,154	
Coast Rica		1,314	
Dominican Republic 1/		575	
Ecuador		1,134	
El Salvador		2,325	
Guatemala		1,884	
Honduras		960	
India		960	
Mexico		1,909	
Nicaragua		698	
Papua New Guinea		610	
Peru		785	
Unwashed Arabicas		16,800	
Brazil 1/		15,500	
Ethiopia		1,300	
Robustas		13,033	
Angola 1/		431	
Indonesia		2,300	
OAMCAF 2/		(6,500)	
Cameroon		1,500	
Ivory Coast		4,200	
Madagascar		800	
Uganda		2,602	
Zaire		1,200	
B. Sub-total: Members exempt from basic quotas		2,800	

1/ See Annex
2/ OAMCAF has an additional quota of 662,000 bags for Members exempt from basic quotas (see Table 2) and a total annual quota of 7,162,000 bags

SOURCE: ICO

Angola

The total annual quota of Angola in coffee year 1981/82 is 2,897,861 bags. Angola has declared a shortfall of 831,000 bags, leaving a balance of 2,066,861 bags. However, Angola is prepared to limit its exports to Member countries to an amount of approximately 431,000 bags on condition that:

(a) if it wishes to increase its exports during coffee year 1981/82 beyond this amount it may do so by informing the Executive Director so that the necessary authorization be granted; and

(b) it shall be exempt from cuts to be applied to quotas during coffee year 1981/82.

Brazil

Brazil is entitled to a quota in coffee year 1981/82 of 16,941,530 bags and has declared that it will limit its exports to Member countries during the year to 15.5 million bags on condition that it will be exempt from cuts in quotas up to 500,000 bags.

Dominican Republic

The Dominican Republic is entitled to a quota of 610,203 bags in coffee year 1981/82 and has declared that it will limit its export to Member countries during the year to 575,000 bags leaving a balance of 35,203 bags on condition that it will be exempt from cuts in quotas of up to this limit.

SOURCE: ICO

TABLE 11
COFFEE YEAR 1981/82
EXPORT ENTITLEMENTS OF EXPORTING MEMBERS
EXEMPT FROM BASIC QUOTA
(60 Kilo bags)

	Export entitlement
TOTAL (a) with OAMCAF	3,438,350
(b) without OAMCAF	2,776,350 1/
Sub-total of Members exporting less than 100,000 bags (without OAMCAF)	666,850
Bolivia	105,850
Ghana	59,500
Jamaica	16,000
Malawi	5,500
Nigeria	67,500
Panama	61,500
Paraguay	105,000
Sri Lanka	49,500
Thailand	95,000
Trinidad and Tobago	30,000
Zimbabwe	71,500
Sub-total of Members exporting more than 100,000 bags (without OMACAF)	2,109,500
Burundi	400,000
Guinea	100,000
Haiti	400,000
Liberia	125,000
Philippines	400,000
Rwanda	375,000
Sierra Leone	220,500
Venezuela	89,000
OAMCAF	662,000
(a) Members exporting less than 100,000 bags	124,500
Benin	49,500
Congo	37,500
Gabon	37,500
(b) Members exporting more than 100,000 bags	537,500
Central African Republic	256,250
Togo	281,250

1/ Estimated additional shortfalls of 638 350 bags to be declared

SOURCE: ICO

Chart 1

INTERNATIONAL COFFEE AGREEMENT PRICE STABILIZATION MECHANISM
15 DAY MOVING AVERAGE INDICATOR PRICE
COFFEE YEAR 81/82
(U.S. DOLLARS PER POUND)

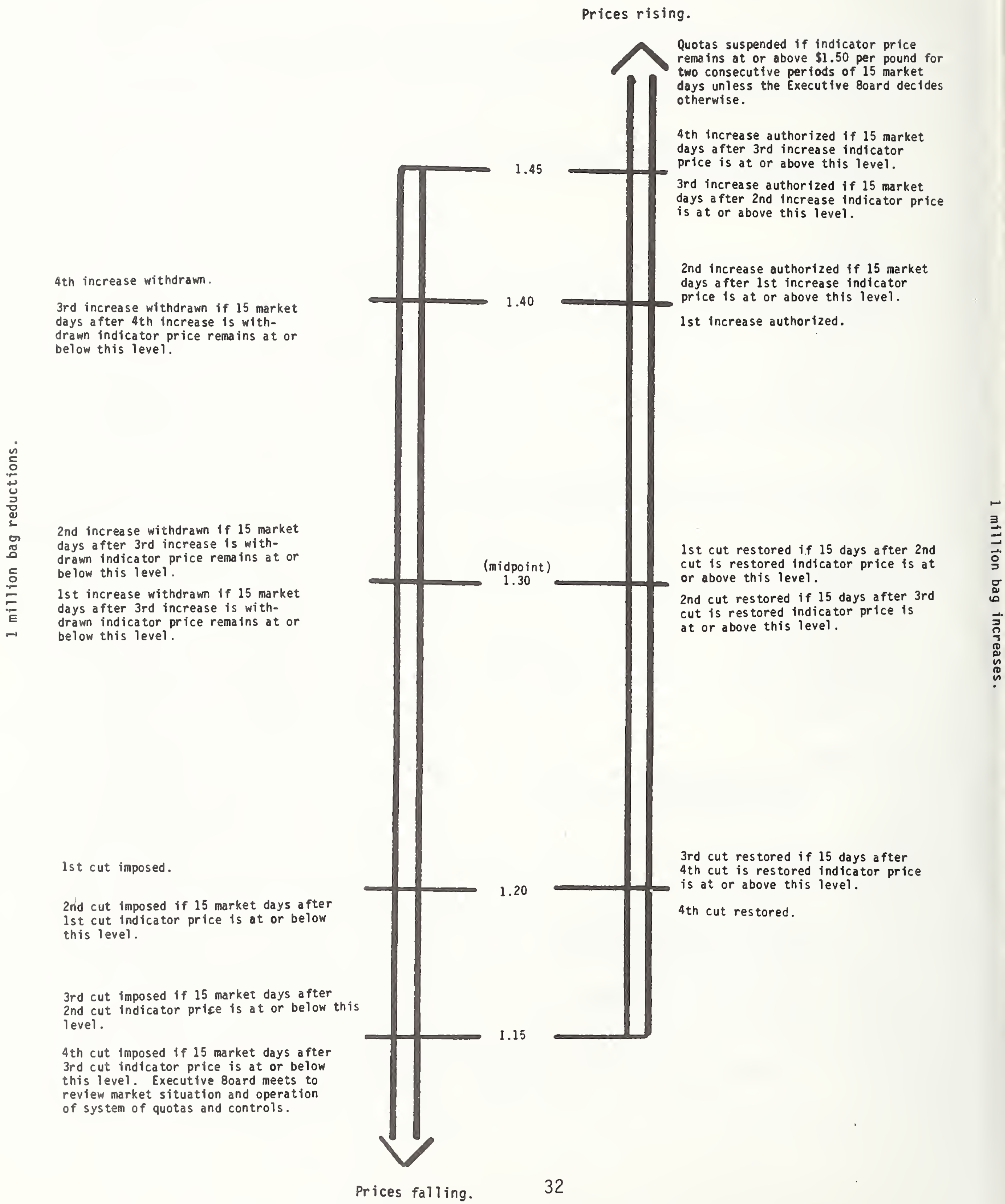
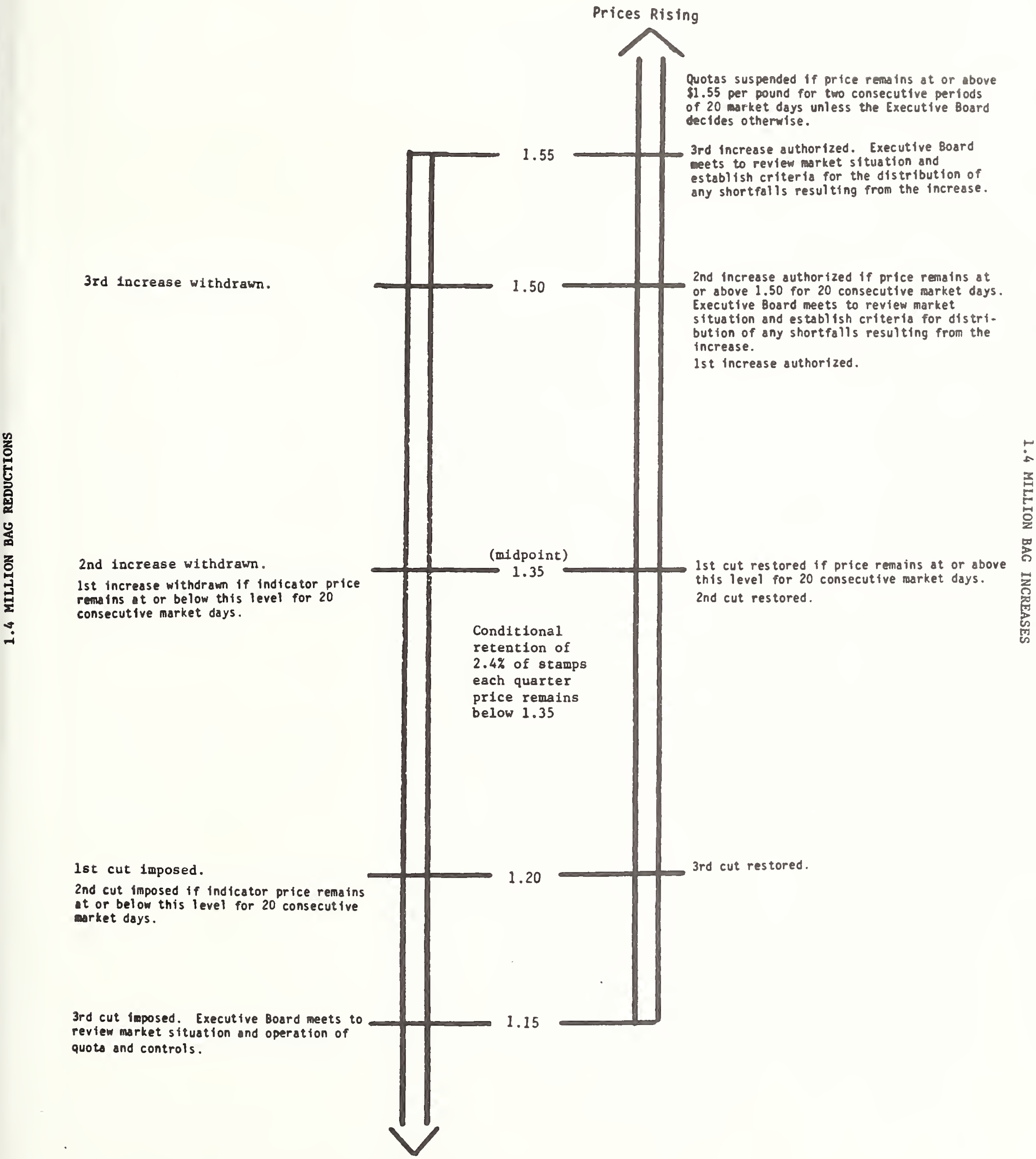


Chart 2

INTERNATIONAL COFFEE AGREEMENT PRICE STABILIZATION MECHANISM
20 DAY MOVING AVERAGE INDICATOR PRICE
COFFEE YEAR 80/81
(U.S. DOLLARS PER POUND)



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